Access Online for Billing Officials

Please go to this web site to begin your ACCESS Online Training – https://wbt.access.usbank.com

The slide presentation is to assist you with:

Getting around the WBT training site

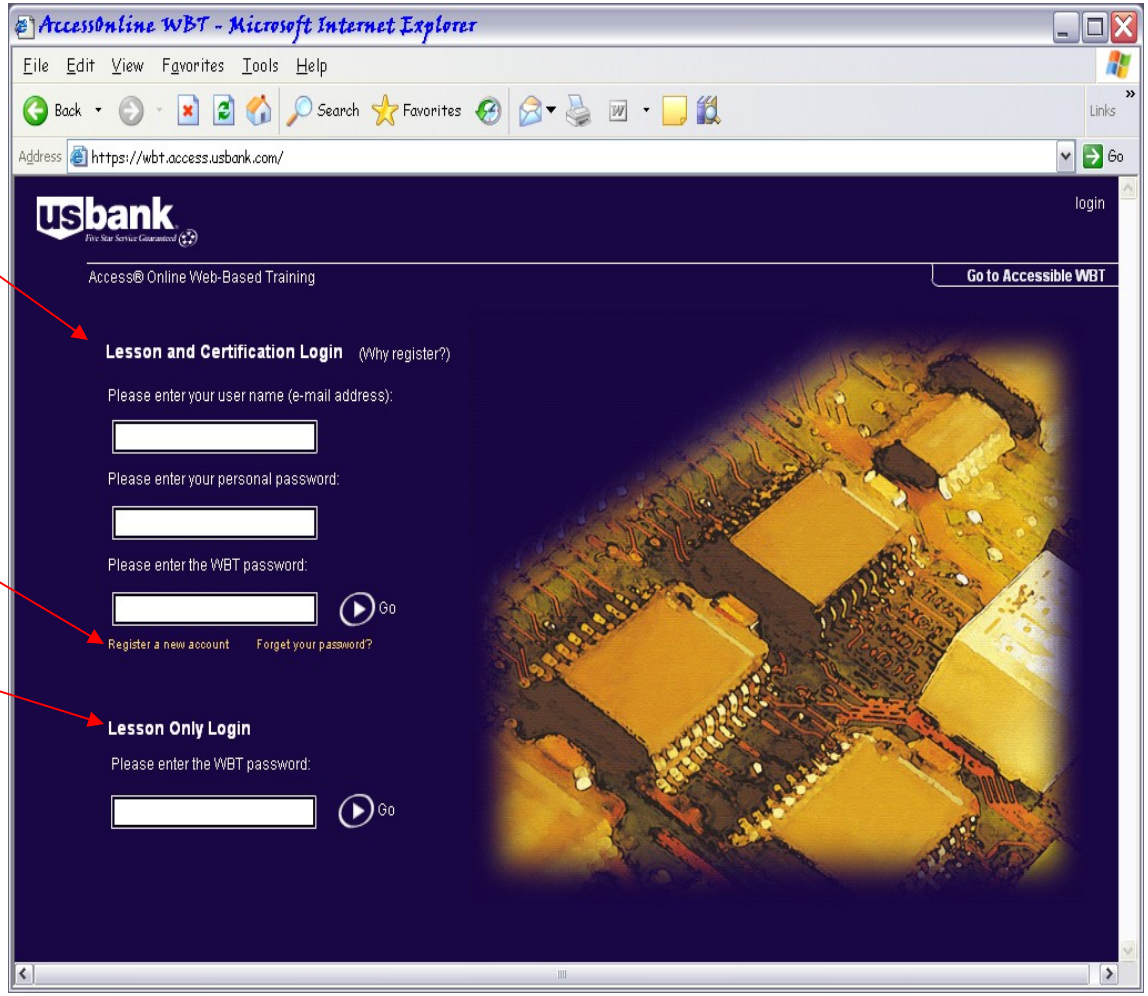
Which Lessons you need to take

How to complete them and receive your certificate

Access Online Registration Page for both Billing Officials & Cardholders

The **Lesson and Certificate Login** is where you will receive your certificate once you have completed the required Lessons. You must first register to use the Lesson and Certification Login.

The **Lesson Only Login** provides the same information, but it is only for training purposes. You can go back to any of the lessons here, as often as necessary to either review or use the *Simulations*.



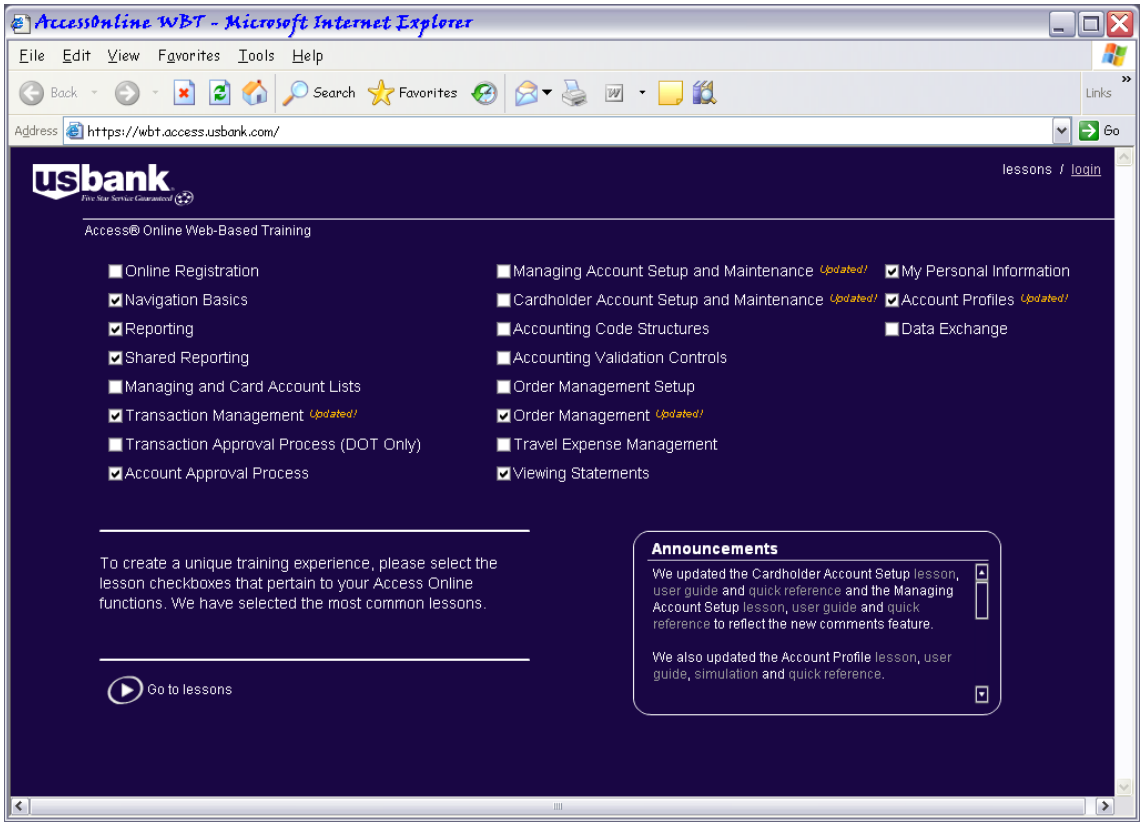
Access Online for Billing Officials – **Lessons Only Login**

For billing officials and alternate billing officials, you will be required to take only the following nine (9) lessons which are checked;

(1) *Navigation Basics,* (2) *Reporting,* (3) *Shared Reporting,* (4) *Transaction Management,* (5) *Account Approval Process,* (6) *Order Management* (7) *Viewing Statements,* (8) *My Personal Information,* (9) *Account Profiles.*

Please remember, this view (to your right) is of the **Lessons Only** Login view.

This Lessons Only Login will be available for future reference.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Navigation Basics
Reporting
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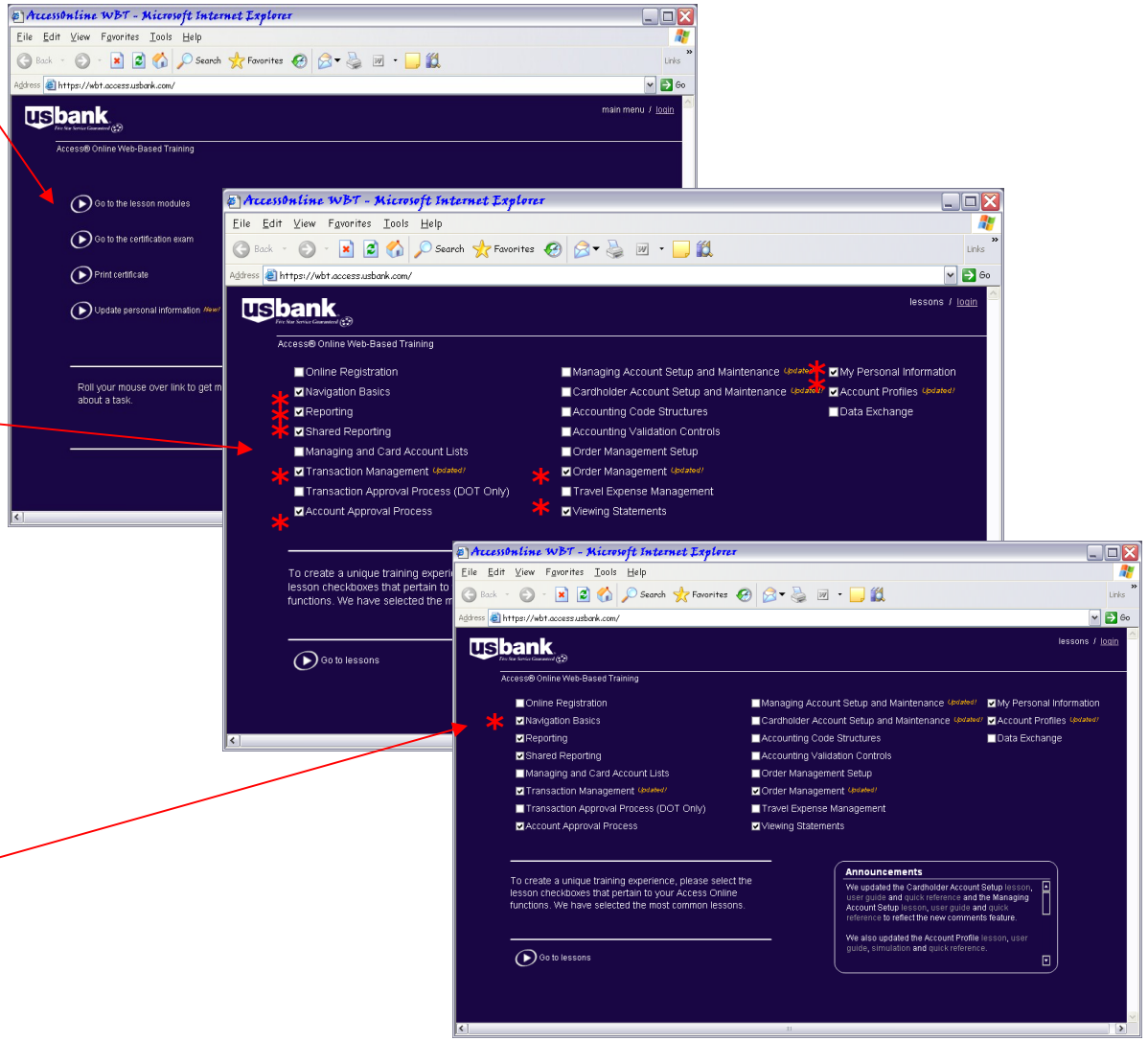
Managing and Card Account Lists
Transaction Management Updated!
Transaction Approval Process (DOT Only)
Account Approval Process
Managing Account Setup and Maintenance Updated!
Cardholder Account Setup and Maintenance Updated!
Accounting Code Structures
Accounting Validation Controls
Order Management Setup
Order Management Updated!
Travel Expense Management
Viewing Statements
My Personal Information
Account Profiles Updated!
Data Exchange
To create a unique training experience, please select the lesson checkboxes that pertain to your Access Online functions. We have selected the most common lessons.
Go to lessons
Announcements
We updated the Cardholder Account Setup lesson, user guide and quick reference and the Managing Account Setup lesson, user guide and quick reference to reflect the new comments feature.
We also updated the Account Profile lesson, user guide, simulation and quick reference.

Access Online for Billing Officials – **Lessons and Certification Login**

After you log into **Lessons and Certification**, this will be the next screen view. You may begin with the [Go to the lessons modules] you will notice the same nine Lessons are checked.

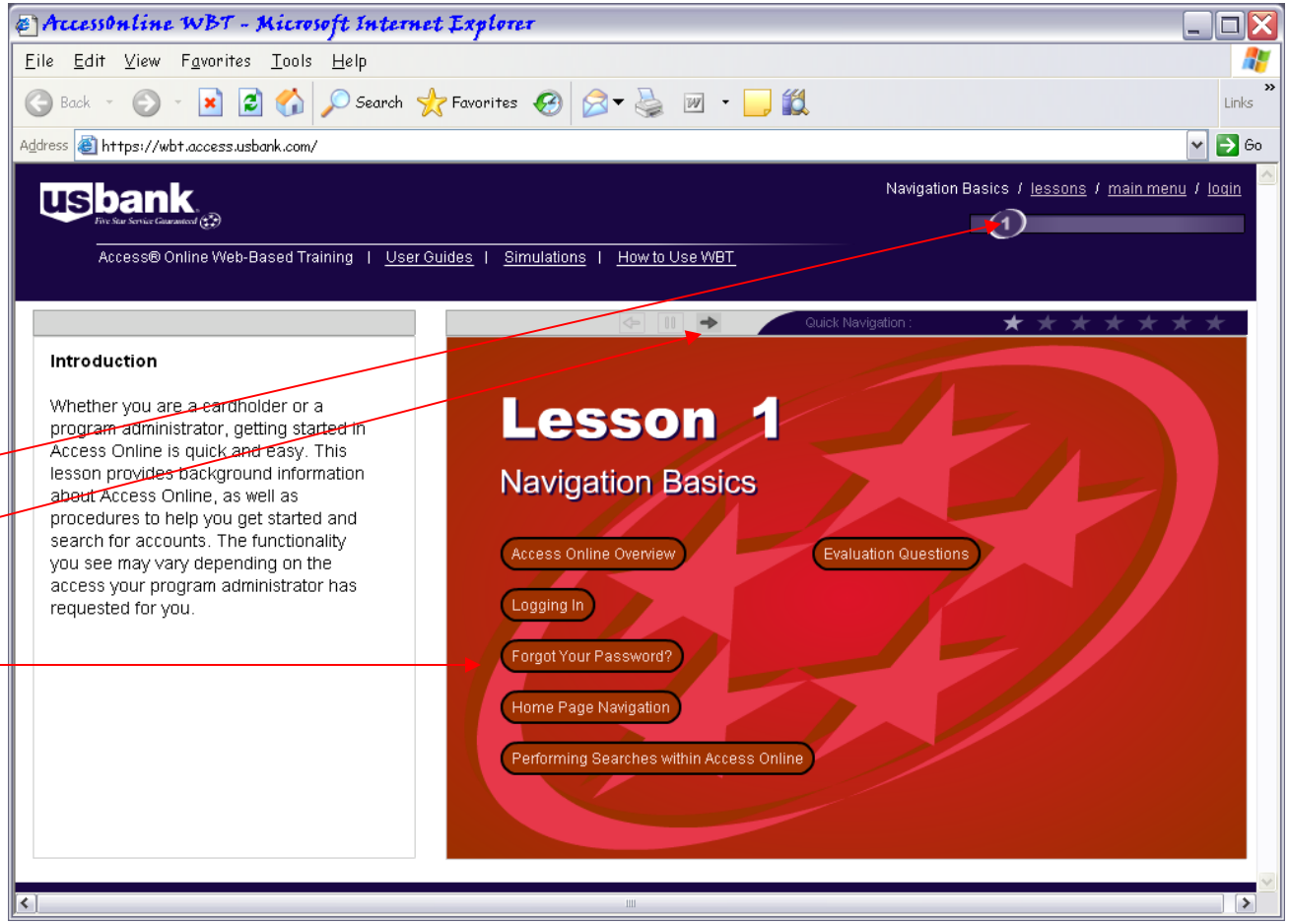
(1) *Navigation Basics,*
(2) *Reporting,*
(3) *Shared Reporting,*
(4) *Transaction Management,*
(5) *Account Approval Process,*
(6) *Order Management,*
(7) *Viewing Statements,*
(8) *My Personal Information*
(9) *Account Profiles.*



It is recommended to do one lesson at a time. To begin, start with **Navigation Basics.**

Access Online for Billing Officials – **Lessons and Certification Login**

To begin the Lesson you may either Click either the number, the arrow, or click on the one of these icons. It will be the same for each Lesson.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Navigation Basics / lessons / main menu / login
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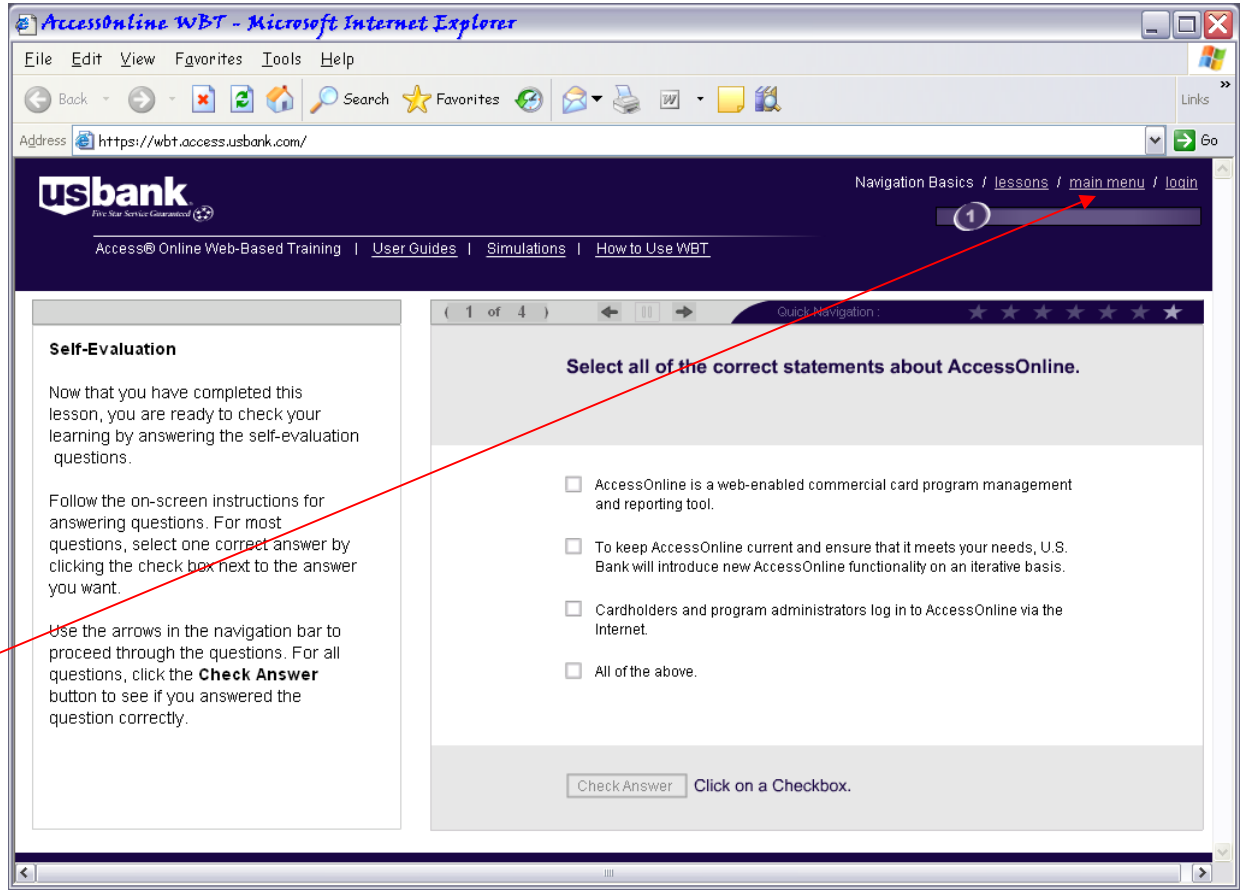
Introduction
Whether you are a cardholder or a program administrator, getting started in Access Online is quick and easy. This lesson provides background information about Access Online, as well as procedures to help you get started and search for accounts. The functionality you see may vary depending on the access your program administrator has requested for you.
Quick Navigation :
Lesson 1
Navigation Basics
Access Online Overview
Evaluation Questions
Logging In
Forgot Your Password?
Home Page Navigation
Performing Searches within Access Online

Access Online for Billing Officials – **Lessons and Certification Login**

After you have completed the Lesson, there are a few *Self-Evaluation* questions. You select your answer and if incorrect you may go back and change your selection. <u>This does not count towards your certificate.</u> When you are ready to take the Certification exam, click on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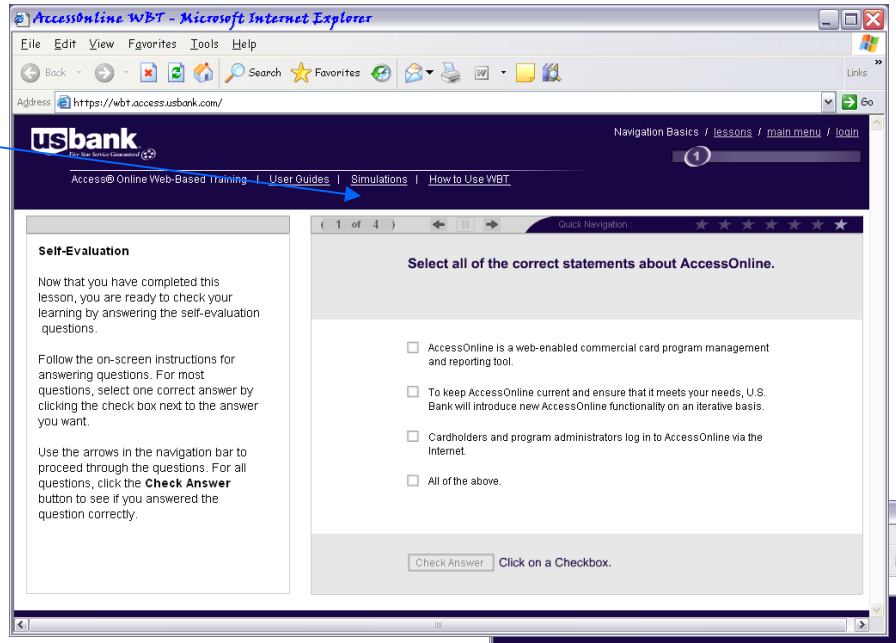
(1 of 4)
Quick Navigation :
Self-Evaluation
Now that you have completed this lesson, you are ready to check your learning by answering the self-evaluation questions.
Follow the on-screen instructions for answering questions. For most questions, select one correct answer by clicking the check box next to the answer you want.
Use the arrows in the navigation bar to proceed through the questions. For all questions, click the Check Answer button to see if you answered the question correctly.
Select all of the correct statements about AccessOnline.
AccessOnline is a web-enabled commercial card program management and reporting tool.
To keep AccessOnline current and ensure that it meets your needs, U.S. Bank will introduce new AccessOnline functionality on an iterative basis.
Cardholders and program administrators log in to AccessOnline via the Internet.
All of the above.
Check Answer
Click on a Checkbox.

Access Online for Billing Officials – **Lessons and Certification Login**

If you require more information about the subject or would like hands on training, you may select the ***Simulations***.

Select the ***Simulation*** based on the Lesson you are accomplishing. For example – ***Simulation 3:*** Navigation Basics. Click to open a new Window it will show you how to *Navigate* in Access, just follow the prompts. When completed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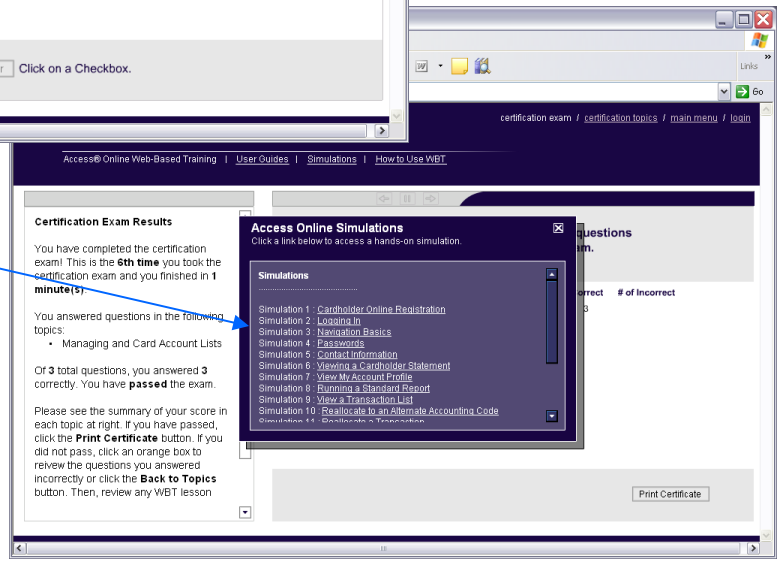
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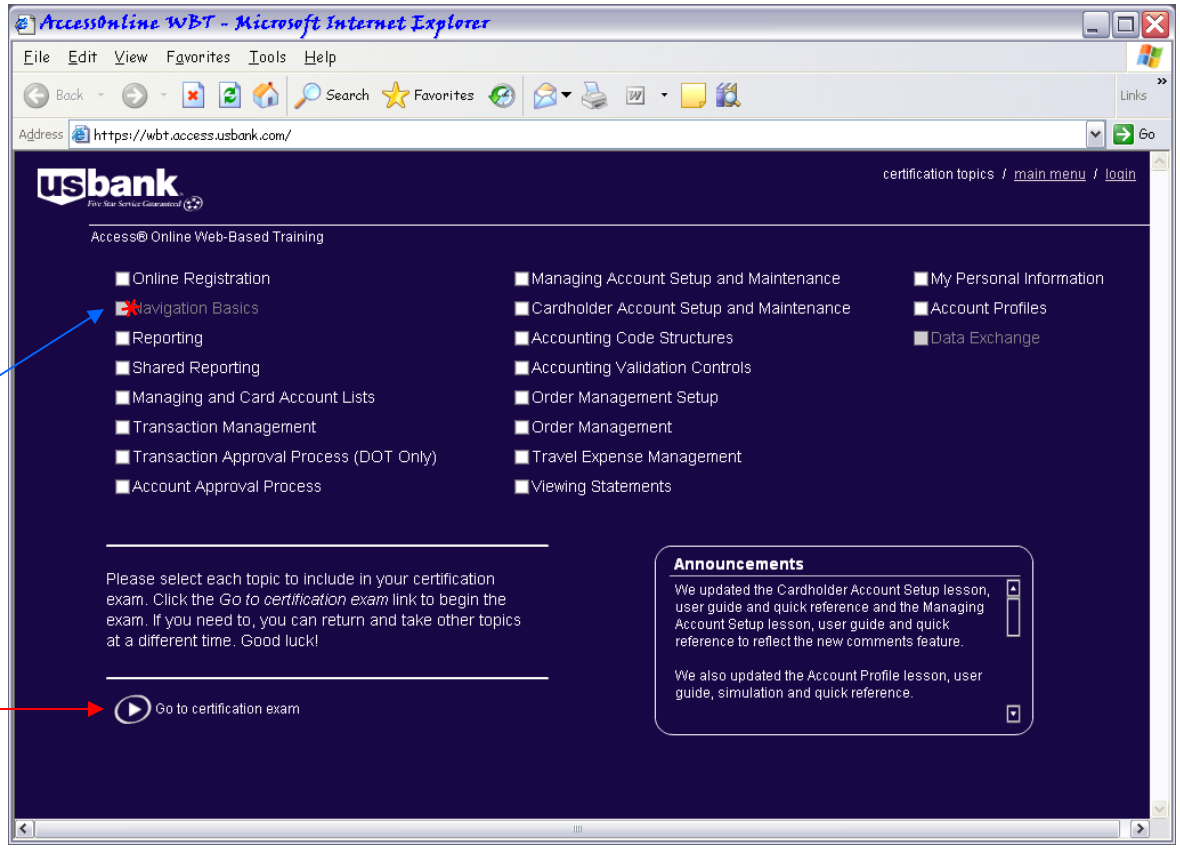
Certification Exam Results
You have completed the certification exam! This is the 6th time you took the certification exam and you finished in 1 minute(s).
You answered questions in the following topics:
Managing and Card Account Lists
Of 3 total questions, you answered 3 correctly. You have passed the exam.
Please see the summary of your score in each topic at right. If you have passed, click the Print Certificate button. If you did not pass, click an orange box to reivew the questions you answered incorrectly or click the Back to Topics button. Then, review any WBT lesson
Access Online Simulations
Click a link below to access a hands-on simulation.
Simulations
Simulation 1 : Cardholder Online Registration
Simulation 2 : Logging In
Simulation 3 : Navigation Basics
Simulation 4 : Passwords
Simulation 5 : Contact Information
Simulation 6 : Viewing a Cardholder Statement
Simulation 7 : View My Account Profile
Simulation 8 : Running a Standard Report
Simulation 9 : View a Transaction List
Simulation 10 : Reallocate to an Alternate Accounting Code
Print Certificate

Access Online for Billing Officials – **Lessons and Certification Login**

As recommended, take one Lesson at a time, take one Certification Exam at a time. Check only the Lesson, you just accomplished. For example, Navigation Basics.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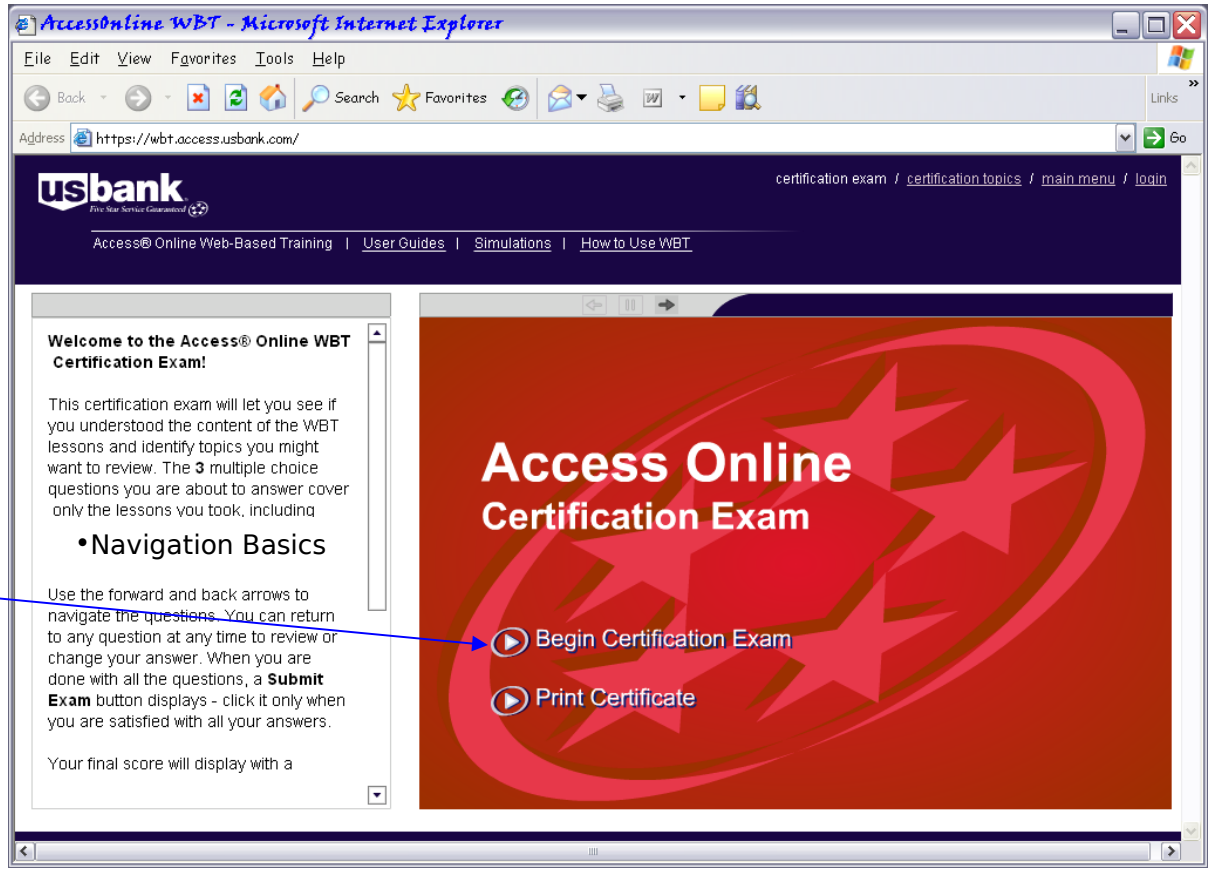
Accounting Code Structures
Accounting Validation Controls
Order Management Setup
Order Management
Travel Expense Management
Viewing Statements
My Personal Information
Account Profiles
Data Exchange
Please select each topic to include in your certification exam. Click the Go to certification exam link to begin the exam. If you need to, you can return and take other topics at a different time. Good luck!
Go to certification exam
Announcements
We updated the Cardholder Account Setup lesson, user guide and quick reference and the Managing Account Setup lesson, user guide and quick reference to reflect the new comments feature.
We also updated the Account Profile lesson, user guide, simulation and quick reference.

Click here to go to the Certification Exam

Access Online for Billing Officials – **Lessons and Certification Login**

Read the instructions and verify you are taking the right Lesson exam.

Click here to begin the Certification Exam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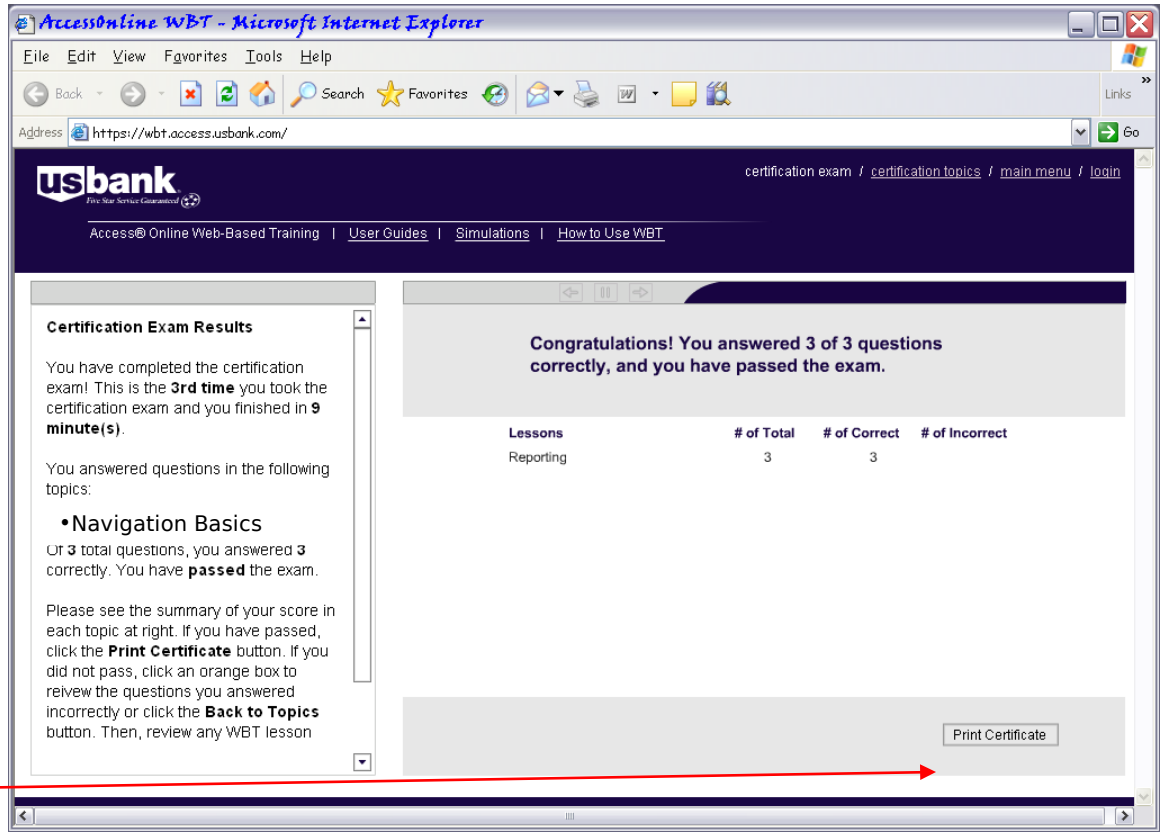
Welcome to the Access® Online WBT Certification Exam!
This certification exam will let you see if you understood the content of the WBT lessons and identify topics you might want to review. The 3 multiple choice questions you are about to answer cover only the lessons you took, including
•Navigation Basics
Use the forward and back arrows to navigate the questions. You can return to any question at any time to review or change your answer. When you are done with all the questions, a Submit Exam button displays - click it only when you are satisfied with all your answers.
Your final score will display with a
Access Online
Certification Exam
Begin Certification Exam
Print Certificate

Access Online for Billing Officials – **Lessons and Certification Login**

After you have successfully completed the exam, this screen will provide your results. It is recommended not to Print Certificate, at this time. When you complete the last of your nine Lessons, you may go to the main menu and select *Print Certificate*. All Lessons completed successfully will appear on the certificate.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Certification Exam Results
You have completed the certification exam! This is the 3rd time you took the certification exam and you finished in 9 minute(s).
You answered questions in the following topics:
•Navigation Basics
Of 3 total questions, you answered 3 correctly. You have passed the exam.
Please see the summary of your score in each topic at right. If you have passed, click the Print Certificate button. If you did not pass, click an orange box to reivew the questions you answered incorrectly or click the Back to Topics button. Then, review any WBT lesson
Congratulations! You answered 3 of 3 questions correctly, and you have passed the exam.
Lessons # of Total # of Correct # of Incorrect
Reporting 3 3
Print Certificate

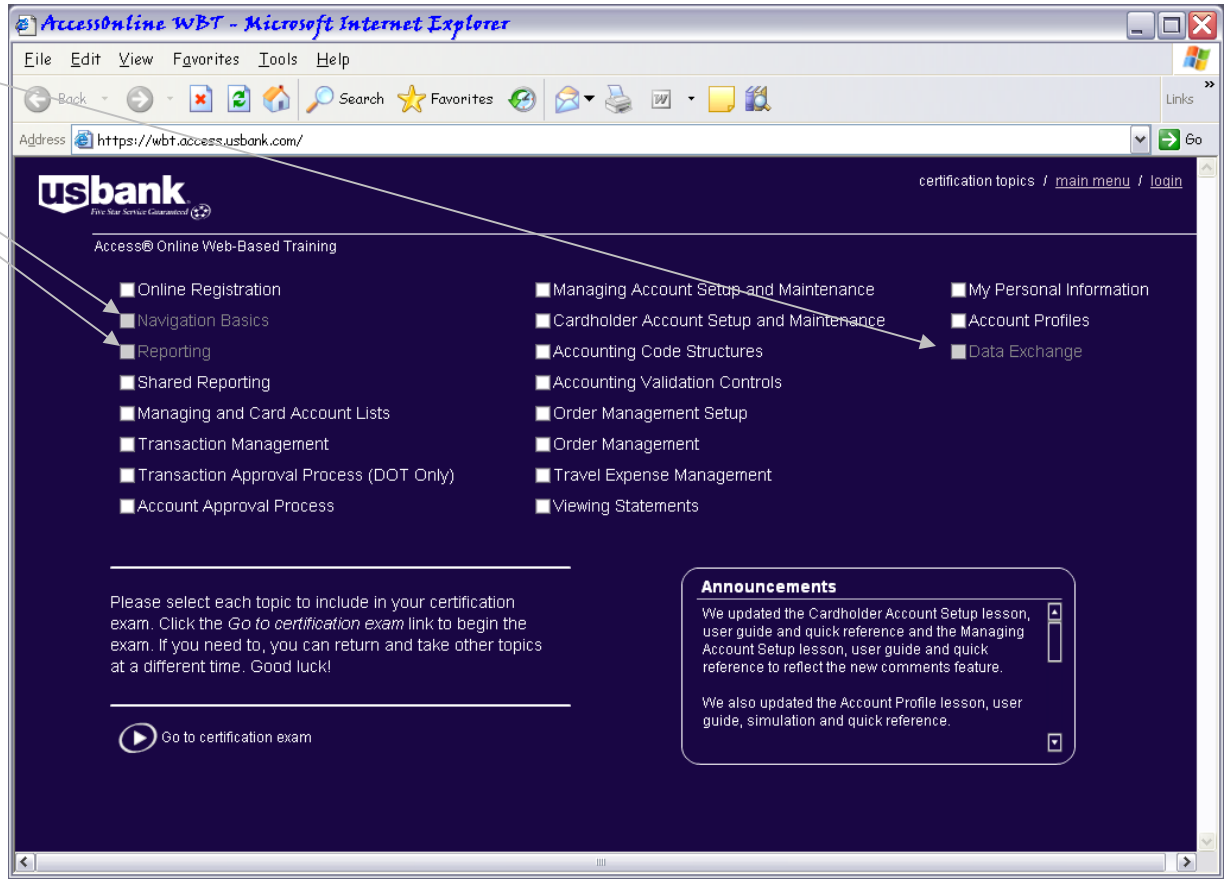
If you choose this option Print Certificate, after each Lesson, you

Access Online for Billing Officials – **Lessons and Certification Login**

You will notice after you have completed a Lesson and it's exam successfully, they become grayed out and are no longer accessible.

Select your next Lesson and proceed the same as the previous, until all ***nine*** Lessons are completed.

Once you Print Certificate, from the Main Menu, please scan and send a copy to you're A/OPC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